

USDA Weekly Retail Turkey Feature Activity

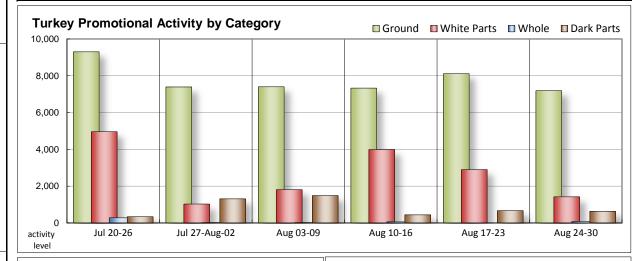
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/24 thru 08/30.

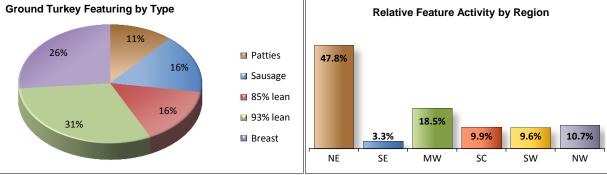
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY												
THIS WEEK LAST WEEK LAST Y												
				of 22,500								
Feature Rate 1/		of 22,500 tlets		tlets	38.2% of 19,500 outlets 4.5%							
Special Rate 4/		8%		.6%								
Activity Index 2/		,760		,950	13,180							
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
WHOLE BIRDS:												
Fresh - Hens	60	1.79										
" - Toms												
Frozen - Hens	10	1.49										
" - Toms	10	1.69										
PARTS:												
Breast:												
Bone-in, whole												
Fresh	30				200							
Frozen	100	1.70	800	1.87	270	1.44						
Split, bone-in												
Fresh	20		180									
Rotisserie	260	8.72	660	7.67	1,450	7.76						
Boneless, whole	30	5.16	270	4.27	30	5.20						
Cutlets	520	5.01	720	4.69	340	4.90						
Cutlets, thin sliced	120	4.82			70	4.63						
Strips	190	4.88			20	3.99						
Tenders	150	4.86	270	3.99	210	4.05						
Marinated Tenders	590	4.08	1,600	5.20	1,000	3.87						
Drumsticks	220	1.94	180	1.99	390	1.54						
Thighs	190	2.03	150	2.05	10	1.88						
Wings	190	1.97	140	1.89	240	1.62						
Necks			140	1.69	40	1.39						
Smoked Drumsticks	10	1.95	20	1.99	140	2.36						
Smoked Wings	10	1.95	30	1.96	210	2.37						
Smoked Necks	10	1.58	10	1.99	130	1.79						
GROUND TURKEY:	7,190	3.44	8,110	3.23	7,890	2.95						
Patties	810	3.21	1,210	3.47	1,110	3.20						
Sausage	1,160	3.04	2,170	2.97	1,860	3.06						
85% lean	1,110	2.62	1,560	2.57	2,080	2.39						
93% lean	2,210	3.04	2,120	3.18	2,160	2.79						
Breast	1,900	4.66	1,050	4.58	680	4.45						
Rolls (frsh/frz 1 lb.)	370	1.93	390	1.87	180	2.39						
Specialty 5/												
Patties	180		20		70							
93-94% lean	260		260	3.97	60							
Breast	40				230							
Note: rolls & specialty no	ot included	l in ground	turkey tot	al and weig	hted avera	age.						

This Week's Turkey Feature Highlights

Promotional activity on turkey slows; retailers turn their attention to other proteins as they gear up for the upcoming Labor Day weekend. Few stores are featuring whole turkeys, which is still more than last week. Offerings on bone-in breasts decline; in a couple months we'll start seeing more of them in the circulars. Featuring is less active on rotisserie breasts and prices are sharply higher. It is the same story on boneless white parts; offerings slow on all the parts and prices increase on everything except marinated tenders. Featuring is more active on dark parts; prices are mixed. Ground turkey offerings slow and the weighted average price increases. Promotional activity increases on 93% lean and ground breast, declines on the other grinds. Advertised prices are higher on most ground items. Deli feature activity slows. Stores increase offerings on service deli private brand thick muscle meats; fewer stores promote thin slicing meats. Offerings for self-service deli slow; advertised prices decline on processor brands, increase on private brands.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.

Fri. Aug 24, 2012

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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/24 thru 08/30.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTH	IEAST U.S.		SOUT	HEAST U.S.		MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 29.9% of 4,000 sampled outlets				
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,I	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,W	/V)					
Feature Rate 1/		0 sampled outle	. ,	, , , , ,	00 sampled outlet	,					
Special Rate 4/	5.6% of stores w	•		· ·	v/ no-price promo		The state of the s	5.0% of stores w/ no-price promotions			
Activity Index ^{2/}		Index = 5,880			y Index = 560		Activity Index = 2,070				
Activity index	Price Range	Summar	V	Price Range	Summai	3/	Price Range	Summa	nrv/		
	(\$/pound)	Stores Wtd Avg		(\$/pound)	Stores Wtd Avg		(\$/pound)	Stores Wtd Avg			
WHOLE BIRDS:	4.70		4.70								
Fresh - Hens	1.79	60	1.79								
" - Toms							4.40	10	4.40		
Frozen - Hens							1.49	10	1.49 1.69		
" - Toms PARTS:							1.69	10	1.09		
Breast:											
Bone-in, whole											
Fresh	3.29	10	3.29								
Frozen	3.29	10	3.29				1.59 - 1.88	90	1.68		
Split, bone-in							1.00	30	1.00		
Fresh	2.99	20	2.99								
Rotisserie	8.99	10	8.99				8.99	180	8.99		
Boneless, whole	5.49	10	5.49				4.99	20	4.99		
Cutlets	4.99 - 5.49	480	5.49	5.49	20	5.49	4.55	20	4.55		
				5.49	20	5.49					
Cutlets, thin sliced	4.99	100	4.99								
Strips	4.99	170	4.99								
Tenders	4.99	130	4.99	5.04	110	5.04					
Marinated Tenders Drumsticks	3.73 - 4.26 1.99	240 190	4.21 1.99	5.31	110	5.31					
	1.99 - 2.29	190	2.03								
Thighs	1.99 - 2.29	170	1.99	1.69	10	1.69					
Wings Necks	1.99	170	1.99	1.09	10	1.09					
Smoked Drumsticks							1.95	10	1.95		
Smoked Wings							1.95	10	1.95		
Smoked Wings Smoked Necks	1.58	10	1.58				1.95	10	1.33		
GROUND TURKEY:	1.50	10	1.50								
Patties	2.39 - 4.49	460	3.08	2.99	10	2.99	2.69 - 3.99	210	3.30		
Sausage	2.80 - 3.99	670	2.93	2.80	70	2.80	2.87 - 3.68	350	3.30		
85% lean	2.66 - 3.00	620	2.71	2.00 - 2.66	180	2.35	2.50 - 2.73	150	2.70		
93% lean	2.84 - 3.45	800	3.19	2.08 - 2.99	80	2.19	2.49 - 3.59	490	2.99		
Breast (99-100% lean)	3.84 - 5.38	1,100	4.76	3.84 - 4.61	80	4.20	4.39 - 4.99	320	4.85		
Rolls (frsh/frz 1 lb.)		.,					1.50 - 1.99	190	1.51		
Specialty 5/									****		
Patties	3.99 - 5.99	160	5.19				3.49	20	3.49		
93-94% lean	3.99 - 4.59	250	4.42								
Breast	5.99	30	5.99				5.99	10	5.99		





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	SOUTH C	ENTRAL U.S.		SOUT	HWEST U.S.	NORT	NORTHWEST U.S.			
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX	,UT)	(C	CA,HI,NV)		(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/	22.8% of 4,00	0 sampled outlet	s	43.9% of 2,9	00 sampled outle	48.0% of 1,200 sampled outlets				
Special Rate 4/	0.0% of stores w/	no-price promo	tions	19.0% of stores	w/ no-price promo	otions	25.9% of stores w/ no-price promotions Activity Index = 360			
Activity Index 2/		ndex = 1,110		Activit	y Index = 780					
·	Price Range	Summary		Price Range	Summary		Price Range	Summa		
	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores	Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens										
" - Toms										
PARTS:										
Breast:										
Bone-in, whole										
Fresh	2.29	20	2.29							
Frozen	1.89	10	1.89							
Split, bone-in										
Fresh										
Rotisserie	7.99	70	7.99							
Boneless, whole										
Cutlets	3.99	20	3.99							
Cutlets, thin sliced	3.99	20	3.99							
Strips	3.99	20	3.99							
Tenders	3.99	20	3.99							
Marinated Tenders	3.99	20	3.99	3.33	190	3.33	2.66 - 3.99	30	3.30	
Drumsticks	1.39 - 1.99	30	1.62							
Thighs										
Wings	1.99	10	1.99							
Necks										
Smoked Drumsticks										
Smoked Wings										
Smoked Necks										
GROUND TURKEY:										
Patties	3.29	50	3.29	3.50	20	3.50	3.28 - 3.99	60	3.70	
Sausage	3.89	10	3.89	2.87	20	2.87	3.02 - 3.27	40	3.10	
85% lean	2.48 - 2.49	80	2.49	2.40	40	2.40	2.49	40	2.49	
93% lean	2.08 - 3.20	280	2.90	2.80 - 3.99	370	3.01	2.79 - 3.59	190	3.14	
Breast (99-100% lean)	3.33 - 4.79	400	4.31							
Rolls (frsh/frz 1 lb.)	1.79 - 3.77	50	3.33	1.99	130	1.99				
Specialty ^{5/}										
Patties										
93-94% lean				3.99	10	3.99				
Breast				1						



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Aug 24, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/24 thru 08/30.

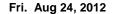
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	Υ			NORTHEAST U.S.		SOUTHEAST U.S.			
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,N	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,N	IC,SC,TN,VA,V	VV)
Factoria Bata 1/	75.1% o	f 22,500	78.9% o	f 22,500	73.1% o	f 19,500						
Feature Rate 1/	sto	res	sto	res	sto	res	93.4% of 4,400 s	93.4% of 4,400 sampled outlets		74.9% of 6,000 sampled outlets		
Activity Index 2/	45	940	53,	170	45	890	Activity Inde	Activity Index = 17,590		Activity In	dex = 7,280	
Activity index 2/	45,	340	55,	170	43,	090	Price Range	Summ	ary	Price Range	Summary	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores \	Ntd Avg
SERVICE DELI - Turkey												
Category 1	0.000	7.00	E 400	7.00	0.400	0.45		0.000	0.00	0.00	000	7.04
Processor Brand	3,900	7.88	5,190	7.89		8.15 7.28		2,820	8.00	6.99 - 8.99	280 10	7.84
Private Brand	3,010	7.75	1,680	7.64	2,550	7.28	6.99 - 8.99	2,200	7.80	7.99	10	7.99
Category 2 Processor Brand	3,840	5.84	4,530	5.62	4,050	6.10	4.99 - 6.99	1,070	5.91	4.99 - 6.99	350	5.46
Private Brand	3,900	6.48	5,750	6.65	4,010	6.40		390	5.38	4.99 - 6.99	1,180	6.09
Category 3	0,000	0.10	0,100	0.00	1,010	0.10	1.00 0.00	000	0.00	1.00 0.00	1,100	0.00
Processor Brand	990	4.09	850	3.98	1,450	3.75	2.99 - 4.99	300	4.23	3.98 - 4.99	350	4.20
Private Brand	1,380	4.80	1,400	4.95	550	4.99		50	4.86	3.99	20	3.99
Turkey Ham												
Processor Brand	300	3.63	450	3.81	130	3.31	2.99 - 4.99	280	3.67			
Private Brand												
Turkey Pastrami												
Processor Brand	90	4.31	320	3.98	480	3.82	3.99 - 4.99	80	4.41			
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,540	7.35	4,240	7.46	-	7.11		1,470	7.43	5.99 - 8.99	1,680	7.37
Private Brand	2,970	6.90	1,360	7.06	1,090	7.37	5.99 - 7.99	2,370	6.93	5.99 - 6.99	200	6.63
Category 2												
Processor Brand	140	5.09	100	4.98		5.22						
Private Brand	720	5.41	1,360	5.03	1,170	4.88	4.99	170	4.99			
SELF-SERVICE DELI												
(dollars per tub or pouch) Turkey 7-10 oz												
Processor Brand	8,150	2.97	9,560	3.17	8,730	3.27	2.49 - 3.99	2,180	3.13	2.19 - 3.99	750	2.98
Private Brand	2,010	2.82	2,780	2.57	2,310	3.02		880	2.76	2.50 - 3.33	300	3.01
Turkey 16 oz	2,010	2.02	2,700	2.51	2,510	3.02	1.00 - 0.00	000	2.70	2.00 - 0.00	300	3.01
Processor Brand	1,790	5.07	1,850	5.31	330	5.93	4.99 - 6.99	370	5.26	4.99 - 5.99	1,230	5.03
Private Brand	,		,3								,	
Chicken 7-10 oz												
Processor Brand	7,420	2.96	8,970	3.19	8,090	3.30	2.49 - 3.99	2,080	3.14	2.50 - 3.79	630	2.94
Private Brand	1,790	2.81	2,780	2.57	2,310	3.02	1.67 - 3.33	880	2.77	2.50 - 3.33	300	3.01

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/24 thru 08/30.

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	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTH	WEST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,M	N,ND,NE,OH,SD,WI	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA	A,HI,NV)	(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/	70 40/ -5 4 000) a surula d a vidada	CE 70/ -5 4 00	O a surella di suella da	F4 C0/ - £ 2 000	0				
	•	sampled outlets	,	0 sampled outlets Index = 5,530	· ·	0 sampled outlets ndex = 3,340	78.5% of 1,200 sampled outlets Activity Index = 2,360			
Activity Index 2/	Price Range	Summary	Price Range	Summary	Price Range	Summary	Price Range Summary			
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey	(, 1 /		(.1		()		(, 1			
Category 1										
Processor Brand	5.99 - 9.99	540 7.10	5.99 - 9.99	230 8.17	5.49	10 5.49	5.99 - 12.99	20 9.14		
Private Brand	6.99 - 9.99	510 7.84	6.99 - 7.99	290 7.18						
Category 2	4.00 0.00	4 000 0 44	2.00 5.00	050 5.07	4.00 5.00	400 544	5.00 5.00	00 500		
Processor Brand	4.89 - 6.99 4.48 - 6.99	1,200 6.14 980 6.20	3.99 - 5.99 4.99 - 7.99	950 5.67	4.99 - 5.99 6.99 - 7.99	190 5.11 290 7.85	5.98 - 5.99 6.99 - 7.49	80 5.99 410 7.23		
Private Brand Category 3	4.48 - 6.99	980 6.20	4.99 - 7.99	650 7.16	0.99 - 7.99	290 7.85	0.99 - 7.49	410 7.23		
Processor Brand	2.98 - 4.58	150 3.90	3.99 - 4.28	140 4.01	2.99	30 2.99	3.98	20 3.98		
Private Brand	4.99	80 4.99	3.99 - 4.99	360 4.67	4.99	550 4.99	3.99 - 4.99	320 4.64		
Turkey Ham	1.00	1.00	0.00	1.07	1.00	1.00	0.00	020 1.01		
Processor Brand	3.49	10 3.49	2.69	10 2.69						
Private Brand										
Turkey Pastrami										
Processor Brand	3.49	10 3.49								
Private Brand										
SERVICE DELI - Chicken										
Category 1										
Processor Brand	5.98 - 7.99	300 6.76	6.98 - 8.49	50 7.56	6.99 - 8.49	40 7.95				
Private Brand	6.29 - 6.99	270 6.60					7.49	130 7.49		
Category 2										
Processor Brand	4.98 - 5.99	140 5.09								
Private Brand	4.99 - 5.99	510 5.58	4.99	40 4.99						
SELF-SERVICE DELI										
(dollars per tub or pouch)										
Turkey 7-10 oz	4.00	4 000 0 70	4.00 0.50	4.500	0.00 0.40	4.000	0.70 0.00	000 040		
Processor Brand	1.99 - 3.99	1,980 2.78	1.99 - 2.50	1,520 2.95 130 2.79	2.30 - 3.49	1,030 2.94	2.79 - 3.99	690 3.12		
Private Brand Turkey 16 oz	2.50 - 3.00	700 2.83	1.99 - 3.00	130 2.79						
Processor Brand	4.99	10 4.99	4.88	10 4.88	4.99	170 4.99				
Private Brand	7.33	10 4.99	4.00	10 4.00	7.99	170 4.99				
Chicken 7-10 oz										
Processor Brand	1.99 - 3.99	1,920 2.76	1.99 - 2.50	1,070 2.87	2.30 - 3.49	1,030 2.94	2.79 - 3.99	690 3.12		
Private Brand	2.50 - 3.00	530 2.78	1.99 - 3.00	80 2.68						

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)